Detailed Content Management Design – Financial Partners

FSA Portals, Release 2

12/10/2002

Author: Casey Moffatt

Last Modified By:

Last Updated:

Version: 1.0

Table of Contents

Change Record

Date	Author	Version	Change Reference
12/10/2002	Casey Moffatt	1.0	Creation of document

Associated Documents

Date	Auth0r	Version	Document Name
12/10/2002	Teale Taggart	1.0	R2 Detailed Requirements.doc
7/12/2002	Rupal M. Mehta	1.0	FP Workflow Design Document.doc

1. Introduction

1.1 Project Overview

The FSA Financial Partners channel portal will bring together, in one simple, personalized Web page all the information and productivity tools relevant to FSA's customers, employees, and partners to make informed financial aid decisions and empower financial partners to assist students. The personalized "front door" will automatically identify and distribute content relevant to each user. The portal will integrate with existing FSA sites (e.g., FMS, NSLDS, Financial Partners Data Mart, etc.), and external sites, using the ITA infrastructure. The portals will be the glue that bonds all of FSA's web services together providing a uniform starting point for channel staff and financial partners to access FSA.

1.2 Purpose

The purpose of this document is to provide a detailed design of the content management systems proposed for Release 2 of the FSA FP Portal. This is meant to identify and describe each of the components required for such a system to be delivered. This is a living document and is in its first draft.

2. Definitions

1. *User Group*: A logical organization of application users.
2. *User Role*: Roles that specify access privileges within Interwoven TeamSite.
3. *Approved Content*: Content that has been processed through the entire workflow and approval process.
4. *Deployment*: The process of moving content into the production environment.
5. *Data Capture Template (DCT)*: The interface used to capture a piece of content, and then push it through workflow.
6. *Data Capture Record (DCR)*: The content record created through the use of a DCT.
7. *Content Type*: Defines a piece of content in the business context of how the content is viewed on the public web site,
8. *Branch*: A logical and physical structure within the Interwoven Team Site environment that reflects the organization of content and workflow within a business.
9. *Workflow*: The content contribution, review and approval process.
10. *.wft:* A workflow template file or "woofty".

3. Content Management

One of the major requirements for Phase 2 of the FSA FP Portal initiative is to incorporate a content management system to enable business users to have control over their content.

3.1 What is 'Content Management'?

A content management system (CMS) is a system used to manage the content of a website. Typically, a CMS consists of two elements: the content management application (CMA) and the content delivery application (CDA). The CMA, element allows the content contributor or author, who may not know HTML, to manage the creation, modification, and removal of content from a Web site without needing the expertise of a webmaster. The CDA element uses and compiles that information to update the website. The FSA FP Portal engagement has chosen Interwoven's TeamSite suite as the CDA and IBM's WebSphere as the CDA.

3.2 Presentation vs. Templating

3.3 Benefits of Content Management

A content management system will offer many benefits to the FSA FP Portal team, not the least of which is that it will allow business users maximum ownership over portal content, and it will minimize the reliance on other departments for the publishing of standard content.

3.4 Limitations

The templates provided with the delivery of the content management system will help FSA FP Portal achieve a standard look and feel across the site. However, the trade off is that the user is effectively locked into a particular page layout.

4. Branching

The term "branching" in the context of the FSA FP Portal engagement and for the purposes of this document refers to the organization of content, or content infrastructure within the TeamSite environment. The purpose of this infrastructure is to help categorize and structure the collection of content. The main categorizations within this infrastructure include the branch, workarea, data type and data category.

The branch is the highest level of division within the TeamSite environment. The branch allows the business to structure their content management into multiple areas of development. It is possible for branches within a single TeamSite environment to be either related (e.g. same site, different language branches) or completely independent (e.g. internet branch, intranet branch). Every branch within the TeamSite environment will consist of archived snapshots of content called editions, a staging area where content is integrated and individual workareas by which it is possible to separate content creation (a more detailed description of these is found below). Branches can also be infinitely sub-divided by using sub-branches, allowing for increased separation of content development. Several branching options were investigated for the FSA FP Portal engagement, focused on aligning the branching structure closely to the business's internal organization. The final approach is that of a single production content entry branch called "fp".

The fp branch will contain all business-entered content including text, images, presentations and multi-media within a single workarea called "content". A TeamSite workarea is a virtual copy of all content within the associated branch's staging area. The workarea is intended to separate content that is "in process" from the approved content in the staging area or other work areas. It is in the workarea that files are added edited and deleted.

TeamSite requires that within a workarea, the infrastructure be further divided into data categories and data types. The data category was used to divide the workarea into functional areas that closely paralleled the production site layout – "NSLDS", "Interest Rates", etc. Figure 2, below, offers an illustrative view of this branching scheme.

Figure 1. Overall Branching

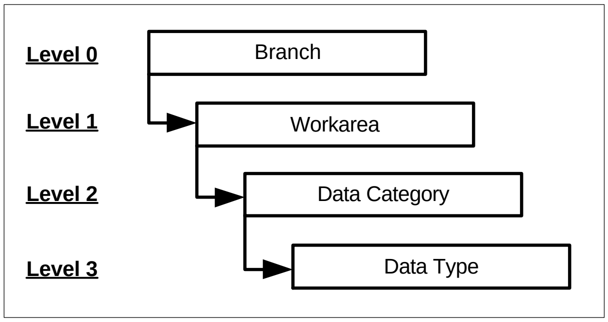


Figure 2. Branching Strategy for Students Portal

fp

- → content
  - o templatedata
    - ▪ fp
      - orgchart
        - o data
        - o presentation
        - o datacapture.cfg
      - righthandnav
      - community
        - o data
          - ▪ secondary_markets
          - ▪ direct_loan_schools
          - ▪ guaranty_agencies

            - lenders
            - servicers
            - trade_associations
            - state_grant_agencies
            - ffel_schools
        - presentation
        - datacapture.cfg
    - contact_resources
    - interest_rates
    - activites_whatsnew
    - general
    - fms_data_nslds
    - headlines
    - calendar
    - misc
    - publications
    - sitemap
    - homepage
- images
- attachments
- admin
- JSP

The section of the branching schema under ‘orgchart’ from ‘data’ to ‘datacapture.cfg’ will repeat for each of the 14 data categories. The data folder will hold the dcrs created via that template, the presentation folder will hold the presentation templates that transform the content entered via dcts into the .jsp page that displays on the internet, and the datacapture.cfg file is the code for the dct itself. The actual jsp pages will be stored in the JSP folder at the 'templatedata' level. The following ideas provide support as to why this particular branching schema was chosen.

4.1 Flexibility and Scalability

In the TeamSite environment, it is very easy to create new branches based on the contents of another. As such, by using a single branch, FSA FP Portal has the flexibility to create additional branches based on the original "fp" branch without concerns for distributed content. This gives the business the flexibility to create separate areas of content development, without a major development effort. This same concept provides FSA FP Portal the ability to scale the system by expanding the scope of the application to include management of content for additional net centric applications such as a corporate intranet.

4.2 Ease of Use/Maintenance

The single branch structure makes the system easier to use and maintain from several perspectives. First, having only one branch effectively removes top-level navigation decision making from the business user resulting in easier acceptance of the system. Second, since an edition is a snapshot of the staging area within a branch, it is much easier for the support team to manage content, i.e. deployment, rollback & archiving, via blocks of single editions instead of through a distributed content model. Additionally, limiting production content to a single branch minimizes the number of editions that are cut, reducing I/O and storage overhead.

5. Data Capture Templates

Data capture templates (DCTs) are forms that collect the various content created by the FSA FP Portal team. As indicated in the branching section above, this design provides for 13 individual templates. Several of the designs incorporate the idea of "page level". For example, a visitor to the FSA FP Portal site clicks on the "FSA Organization Chart" link on the Contact Resources main page. This takes them to the "level one" Organization Chart page, or the main page. The level one Organization Chart page lists several links to more information about individual employees. These employee information pop ups are considered "level two" Organization Chart pages. Several of the following template designs capture level one and level two content via the same template.

5.1 Publications Template

This template is designed to capture all Publications content displayed on the FSA FP Portal. When a user opens this template\, the first field they will see is the 'Page Level' select list. Based upon their selection, the following additional fields will be provided.

Level One

If the user selects "level 1" from the drop down list, the following fields will be provided:

Main Header:	"Publications"		Textbox	Required
Description/Blurb:	This field captures the descriptive paragraph		Textarea	Required

	following the header on the main Publications page			
Replicant block 1:	This is a repeating field that will capture each link section of the main page.		Replicant	Required
	Paragraph title	For example: "Voluntary Flexible Agreement (VFA)"	Textbox	Required
	Paragraph title link	This is the URL a user is taken to should they click on the paragraph title.	Textbox	Not Required
	Descriptive paragraph(s)	A paragraph(s) describing the link/title above.	Textarea	Not Required
Page Level	This is a metadata field that allows TeamSite to dynamically create the appropriate template		Select List: Level One, Level Two	Required
Last Modified Date	This is a metadata field that captures the last date upon which the content was modified	DATE	Textbox	Required

Note that not every field is required.

Level Two

If the user selects "level 2" from the drop down list provided, an alternate set of fields will display as this content page has a different layout than that of the main Publications page:

Main Header:	"Voluntary Flexible Agreement"		Required
Description/Blurb:	This is the free form paragraph following the sub heading.		Required

Replicant Block 1:	This is a repeating field that will capture each section of the page.		Required
	Paragraph/Section Title	For example: "User Guides	Not Required
	Paragraph/Section Title URL	The URL behind the Title described above	Not Required
	Link Text	The name of an individual user guide or whitepaper etc.	Required
	Link URL	The URL behind the link text mentioned above	Required
	File format	For example: pdf, doc, etc.	Required
	File Size	The size of the file.	Not Required
	Descriptive paragraph(s)	A paragraph(s) describing the link/title above.	Not Required

5.2 Interest Rates Template

The Interest Rates template is designed to capture both the high level Interest Rates content as well as the loan-specific rate fields that will be used to populate the various rate tables. The appropriate fields will be displayed based on the selection the user makes for page level.

Level One

When a user selects “Level One” from the drop down box, the following fields will be provided:

Header	"Interest Rates"		Required
Description	This field captures the descriptive text following the main header.		Not Required
Replicant Block 1	This is a repeating field that captures each section of		Required

	the main page.		
	Section Heading	For example: "Current Interest Rates"	Required
	Section Heading URL	The URL behind the "Section Heading" field described above	Not Required
	Short Description	This field captures descriptive text related to the "Section Heading" field described above	Not Required
Page Level	This field captures the metadata that determines the template fields to display.		Required
Last Modified Date	This field captures the last time the content was modified.		Required

Level Two

The following fields are provided when a user selects "Level Two" from the drop down list:

Header	Captures the name of the detailed interest rate in question	Required
Table Section 1	"Cohort"	Required
Type of Borrower	Select List: New, All	Required
First Disbursement On or After	DATE	Required
First Disbursement Before	DATE	Required
Consolidation Loans After	DATE	Required
Consolidation Loans Before	DATE	Required
On or After Date	DATE	Required
Before Date	DATE	Required
Table Section 2	Citation	Required
Higher Education Act of 1965 (As Amended)	Free form text	Required
Table Section 3	Interest Rates Formula	Required
During	Select List: In School, Grace, Deferment, All	Required
91-Day Treasury Bill Rate	PERCENTAGE	Required
Additional Sum	PERCENTAGE	Required
Total	PERCENTAGE	Required
Maximum Rate	PERCENTAGE	Required
Interest Rates for Period <year>	PERCENTAGE	Required
Method Used to Determine Interest Rate	Free form text	Required

Page Level	Drop down: Level One, Level Two	Required
Type of Loan	Drop Down: Stafford, PLUS/SLS, Consolidated	Required
Last Modified Data	DATE	Required

5.3 Current Activities/What's New Template

The Current Activities and What's New content currently being rendered on the site is similar enough in layout to justify having them share a template. As with several of the content types already described, both Current Activities and What's New have level one and level two page content.

Level One

If a user selects "Level One" from the drop down list, the following fields will be provided:

Header 1	"Current Activities"		Textbox	Required
Description 1	This field captures the main description on the page immediately following the header.		Textarea	Required
Section Header 1	"Projects"		Textbox	Not Required
Replicant Block 1	This is a repeating field that captures individual sections of the page		Replicant	Required
	Title	This field captures the text for the section title. For example: "Lender Payment Process Redesign…"	Textbox	Required
	Title Link	This field captures the URL behind the section title described above	Textbox	Not Required
	Description	This field captures the section-related descriptions.	Textarea	Not Required
	Interest Rate Flag	This field indicates if the content should be displayed on the homepage.	Checkbox	Not Required
	Abstract	This field captures the text to display on the homepage	Textarea	Not Required
	Image	This field allows the user to browse the	Image	**Only for What's New

		TeamSite repository for an image		
	Image Link	The URL behind the image described above	Textbox	**Only for What's New
	Alt Text	Required for 508 Compliance	Textbox	**Only for What's New
Section Header 2	"Presentations"		Textbox	Not Required
Replicant Block 2	This is a repeating field that captures individual links to presentations.		Replicant	Required
	Title	The name of the download.	Textbox	Required
	Title Link	This is the URL behind the title field described above.	Textbox	Required
	Author and Position	This field captures the author(s)'s name and their position within the company.	Textarea	Required
	Date of Presentation Creation	DATE	Textbox	Required
	File format	The type of file to be downloaded (pdf, doc, etc)	Textbox	Required
	File Size	The size of the file (in Kb) to be downloaded.	Textbox	Not Required
Content Type	This field tells the application server where to render the content		Select List: Activity, What's New Item	Required
Page Level	This field tells TeamSite which template fields to provide to the user		Select List: Level One, Level Two	Required

Last Modification Date	This field captures the last time the content was touched.	DATE	Textbox (READONLY)	Required

Level Two

If the user selects “Level Two” from the Page Level select list, the following fields will be provided on the template:

Header	“Lender Payment Process Redesign”		Textbox	Required
Description	This field captures the main description on the page immediately following the header.		Textarea	Required
Replicant Block 2	This is a repeating field that captures individual links to presentations.		Replicant	Not Required
	Title	The name of the download.	Textbox	Not Required
	Title Link	This is the URL behind the title field described above.	Textbox	Not Required
	Author and Position	This field captures the author(s)'s name and their position within the company.	Textarea	Not Required
	Date of Presentation Creation	DATE	Textbox	Not Required
	File format	The type of file to be downloaded (pdf, doc, etc)	Textbox	Not Required
	File Size	The size of the file (in Kb) to be downloaded.	Textbox	Not Required

5.4 FMS/Data Mart/NSLDS "User Button Pages" Template

This design uses a single template to capture the content associated with the FMS, Data Mart, and NSLDS content types. The basis for this was that each page has essentially the same layout.

Level One

The first field available to the user when they open this template is the Page Level. When a user selects this Level One from the drop down, the following fields will be available to them:

Header 1	"FMS Quick Access"		Required
Header 2	For example: "What is FSA's…"		Not Required
Description	This field captures a short description of the general page		Required
Replicant Block 1: Page Sections	This is a repeating field that captures each section of the main page		Required
	Title	Textbox	Required
	Title Link	This field captures the URL behind the "Title" described above	Not Required
	Short Description	This field captures specific details related to the "Title" field above.	Not Required
Replicant Block 2: User Button	This is a repeating field that captures the content needed to properly display the user buttons.		Required
	Button Name	"LAP"	Required
	Image		Required
	Image URL	Textbox	Required
	Alt Text	Textbox	Required

	Link text	Textbox	Required
	Link URL	Textbox	Required
Button Help	"FSA FMS Help Desk Information"		Required
Help Desk Hours	Textbox		Required
Help Desk Phone Number	Textbox		Required
Help Desk Email	Textbox		Required
Help Desk Email Link	Textbox		Required
Content Type	This is a metadata field that tells the application server where to display the content.	Drop down: FMS, Data Mart, NSLDS	Required
Last Modified Date	DATE		Required
Page Level	This fields helps TeamSite determine the correct template fields to display	Drop down: Level One, Level Two	Required

Level Two

When a user selects "Level Two" from the drop down, the following fields will be provided:

Header 1	"Lender Reporting"			Required
Description	This field captures a short description of the general page			Required
Replicant Block 1: Page Sections	This is a repeating field that captures each section of the page			Required
	Section Heading	For example: "ED FORM 799…"		Required

	Short Description	This field captures specific details related to the "Title" field above.		Not Required
	Replicant Block 2: Links	This is a repeating field that captures the content needed to properly display the user buttons.		Required
		Link text	This is the text indicating the form, etc. that may be downloaded	Not Required
		Link URL	This is the URL behind the "Link Text" field above	Not Required
		Filetype	508 Compliance: pdf, doc, etc.	Not Required
		Number of Pages	This field indicates the number of pages in the download.	Not Required
	Hard Copy Address	This field captures the address to send to for a hard copy of the downloadable file.		Not Required
Content Type	This is a metadata field that tells the application server where to display the content.	Drop down: FMS, Data Mart, NSLDS		Required
Last Modified Date	DATE			Required
Page Level	This fields helps TeamSite determine the correct template fields to display	Drop down: Level One, Level Two		Required

5.5 Organization Chart Template

The Organization Chart template will be used to capture the individual employee information content. When a user opens one of these templates, the first field they will see is the 'Page Level' select list. Based upon their selection, the following additional fields will be provided.

Level One

When a user selects "Level one" from the drop down box, the following fields will be provided:

Header	"Financial Partners Organization Chart"	Required
Description	This is the free form paragraph following the main header.	Required
Employee Name	This field captures the employee's name, which is displayed both on the level one page and the pop up window.	Required
Employee Title	This field captures the employee's title within the company	Required
Location	This field captures the employee's primary work location	Required
Page Level	Drop down list: level 1, level 2	Required
Last Modified Date	DATE	Required
Content Type	Drop down list: FP, Students, Schools, CIO, CFO	Required

Level Two

When a user selects Level Two from the drop down, the following fields will be provided:

Employee Name	This field captures the employee's name, which is displayed both on the level one page and the pop up window.	Required
Employee Title	This field captures the employee's title within the company	Required
Location	This field captures the employee's primary work location	Required
Phone Number	This field captures the employee's	Required

	work phone number	
Email	This field captures the employee's email address	Required
Email Link	This field captures the URL to the employee's email address, allowing the creation of a link	Not Required
Responsibilities	This field provides a space for which to describe the employee's primary responsibilities within the company	
Page Level	Drop down list: level 1, level 2	Required
Last Modified Date	DATE	Required
Content Type	Drop down list: FP, Students, Schools, CIO, CFO	Required

5.6 Community Members

The Community Members template will function somewhat differently than the other templates in that all of the content collected via the template will be stored in a database table. There is will be accessible via SQL statements and search functionality. The following fields will be provided in the Community Members template:

Organization Name	This field captures the name of the community	NAME	Textbox	Required
Organization Name URL	This field captures the link behind the 'Organization Name' field described above	URL	Textbox	Required
Organization Acronym	This field captures the acronym (if applicable) associated with the 'Organization Name' field described above	ACRONYM	Textbox	Required
Category	This field captures the type of community	CATEGORY	Select List	Required
Organization Address Line One	This field captures the first line of the organization's address	ADDRESS_LINE1	Textbox	Required
Organization Address Line Two	This field captures the second line of the organization's address	ADDRESS_LINE2	Textbox	Required

Organization City	This field captures the city the organization resides in	CITY	Textbox or Select List?	Required
Organization State	This field captures the state the organization resides in	STATE	Textbox or Select List?	Required
Organization Region	This field captures the region the organization resides in	REGION	Textbox or Select List?	Required
Organization Zip Code	This field captures the zip code the organization resides in	ZIP_CODE	Textbox	Required
Organization Contact Phone Number	This field captures the organization's phone number	CONTACT_PHONE	Textbox	Required
Organization Contact Email	This field captures the organization's email address	CONTACT_EMAIL	Textbox	Required

5.7 Homepage Template

The Homepage template is designed to provide the business users some control over the look and wording of the homepage content. Though this template will not provide a means by which to modify the left hand navigation or header/footer, etc., it will allow them to change the wording of the descriptive content, as well as update the images in the main content body. The homepage template will provide the following fields:

Image	This field captures the image displaying the homepage title		Image	Required
Alt Text	508 Compliance - must have alt text if rendering images		Textbox	Required
Content Body	Free form paragraph(s) that capture the content body text		Textarea	Required

Last Modified Date	This field records the last time the content was touched.		Textbox (READONLY)	Required
FSA Table Title	This field captures the title associated with the "image table" on the bottom center of the page.		Textbox	Required
Replicant Block 1: Financial Systems Table	This is a repeating field that captures the images and links associated with the table in the bottom center of the homepage		Replicant	Required
	Image	This field captures an image associated with the FSA financial systems links	Image	Required
	Link Text	This field captures the link to the financial system site.	Textbox	Required
	Image/Link URL	This field captures the URL associated with the Link Text and the Image fields above.	Textbox	Required
	Alt Text	508 Compliance	Textbox	Required

5.8 Right Hand Navigation Template

The Right Hand Navigation template is designed to capture the content displayed in the right hand navigation bar on the homepage. This will allow the business users control over wording and images without having to go through the VDC. When a business user selects the Right Hand Navigation template, the following fields will be available:

Header	"What's New"	Required
Abstract	This field captures the text that displays in the box on the homepage	Required
Image URL	This field captures the URL to the image described in the following field.	Not Required
Image	This field allows the user to browse the TeamSite directory structure for an image to display on the homepage	Not Required
Alt Text	This field captures the alt text for the image described above	Not Required
Content Type	Drop down list: Publications, Feedback, What's New	Required
Last Modified Date	DATE	Required

5.9 General Content Template

The General Content template was designed to capture that high level FSA FP Portal content which had relatively the same page layout. The decision to group this content together was based on a couple of factors: the content didn't really belong to any other logical grouping, and it would be inefficient to have a separate template for each content area as there would likely be only a couple of individual pages per template. With this in mind, as user will utilize the General Content template to create content for the following areas: About Us, Customer Service, Privacy, Security, and Notices. The template will provide the user with the following fields:

Header	"Notices"		Required
Description	This is the free form paragraph following the main header.		Required
Replicant block 1:	This is a repeating field that will capture each section of the main page.		Required

	Page Section Header:	For example: "Copyright Notice"	Not Required
	Content Body	This is the free form paragraph(s) following each page section header.	Required
Content Type	This is metadata that will inform the application server where to display this content.	Drop Down: About Us, Customer Service, Privacy, Security, Notices	Required

Currently there are anchor tags imbedded within the Privacy page. These will no longer be available with Release 2.

5.10 Site Map Template

The Site Map template is designed to capture links to the various pages of the site. The table below describes the fields that will be available to a business user when they open the template:

Header	"Site Map"			Required
Replicant Block 1:	This is a repeating field that will capture each main page link.			Required
	Functional Area Title	This field captures the main functional areas of the site		Required
	Functional Area Link	This field captures the URL behind the Functional Area Title		Not Required
	Replicant Block 2:	Secondary Page Title	This field captures the main functional areas of the site	Not Required
		Secondary Page Link	This field captures the URL behind the Secondary Page Title	Not Required

5.11 Contact Resources

Although the main Contact Resources page will (image map) will remain static, the secondary pages will be captured via the Contact Resources template. The following fields will be provided to the user via the DCT:

Header	"Southern Region Contact Resources"		Textbox	Required
Regional Director	This field captures the name of the Regional Director		Textbox	Required
RD Email	This field captures the email address of the RD		Textbox	Required
RD Email Link	This field captures the email URL of the RD		Textbox	Not Required
Regional Office Number	This field captures the RD's contact number		Textbox	Required
Regional Mailing Address	This field captures the mailing address for the RD		Textarea	Required
States in Region	The individual states associate with the region.		Multi-Select or Free Form Text	Required
Replicant Block 1	This is a repeating field that captures the individual state contact's information		Replicant	Required
	Section Header	"State Contacts"	Textbox	Not Required
	State	The name of the state	Textbox	Required
	State Contact Name	The name of the state's contact person	Textbox	Required
	State Contact Email	The state contact person's email address	Textbox	Required

	State Contact Email Link	The URL behind the state contact person's email address	Textbox	Required
	State Contact Phone Number	The state contact person's phone number	Textbox	Required
Image	This field allows for the association of an image with the contact information		Image	Not Required
Alt Text	508 Compliance - must have alt text if rendering images		Textbox	Not Required
Region	This field lets the application server know which states to associate with which regions on the image map		Select List: Western, Southern, Northern, Eastern	Required
Last Modified Date	This field records the last time the content was touched.		Textbox (READONLY)	Required

5.12 Calendar and Announcements Templates

The existing Calendar and Announcements templates will continue to be used for Release 2 with the addition of one field: Modification Date. In addition, the Announcements template will also capture Homepage Navigation Header.

5.13 Miscellaneous Template

The final data capture template is designed to be a "catch all" template of sorts. It is meant for the remaining content pages that do not fit into any other logical group. Examples of content pages that would use the Miscellaneous template are: Loan & Grant Resources main page, informational and disclaimer messages (adobe down loads, etc). The following fields will be provided to capture the miscellaneous content:

Header:	"Contact Resources"		Textbox	Required

Description 1:	Free form paragraphs to generally describe the header above		Textarea	Required
Replicant Block 1	This is a repeating field to capture each section or link on the page		Replicant	Not Required
	Link Text	The text for the link.	Textbox	Not Required
	Link URL	The URL behind the "Link Text" field described above	Textbox	Not Required
	Short Description	Free form paragraphs describing the "Link Text" field above	Textarea	Not Required
Image	This field captures an image from the TeamSite repository		Image	Not Required
Alt Text	508 Compliance		Textbox	Not Required
Content Type:			Select List: Loan & Grant Resources, Disclaimer, Download, Information	Required
Last Modified Date	This field identifies the last time the content was touched.		DATE (READONLY)	Required

6. Presentation Templates

***add code

6.1 templating.cfg

***add code snippet and describe

7. Naming Conventions

***the dcr and jsp names must match for workflow

8. Administrative Tasks

There are certain sections of the FSA FP Portal that will continue to require the assistance of an administrator or webmaster in order to modify. Among these areas are:

- Left Hand Navigation on the homepage
- Header
- Footer
- Survey
- Search

While this content will not be templated, it is still feasible to store the jsp pages in TeamSite. Acting as a source code repository, TeamSite would eliminate the need for the properties file currently being used for internationalization. More importantly, it the application server would no longer need to be restarted after each modification.

9. Workflow

The Financial Partners Portal at FSA requires workflows that streamline the process of creating, approving, and deploying content to production, and that are also effective in allowing content creation, update, and approval by authorized persons. Please refer to the 'Authorized Users' section below for a complete list of authorized persons.

The required functionality can be executed through customization of TeamSite's workflow templates, and the workflows can be invoked using TeamSite's out-of-the-box Submit Task workflow functionality.

Upon content submission, users will be prompted to select an internal contribution or external contribution workflow. Internal contribution is such that the initiator of the workflow has access to the TeamSite environment. If the user selects an internal contribution workflow, they will then be prompted to select the approver for the workflow. If the user selects an external contribution workflow, they will be prompted to select the external contributor's name, as well as the internal approver for the content.

9.1 Workflow Job Specification File

The workflow job specification file is the actual XML file (skeleton) that defines each of the workflow tasks to be performed. It describes the user tasks such as the submit task, deployment tasks, an approval step, email tasks, and everything that needs to be accomplished by the workflow.

The .wft works very nicely as it allows the combination of the workflow logic and the workflow job skeleton into one file. Using Perl programming logic, it is possible to create the input form, the job specification file, and launch the workflow engine in one place.

9.2 Special Functionality

Automatic Deployment

A major advantage of this workflow is the ease with which content can be pushed to test and production servers without any user intervention. Once the user who creates or updates content submits the file, it is automatically deployed to the test server by the custom script portals_deploytotest.ipl. Similarly, once the designated reviewer has approved a file, it is automatically deployed to the production server by the custom script portals_deploytoprod.ipl. These .ipl files invoke OpenDeploy and DataDeploy on predefined configuration files to deploy content.

To invoke OpenDeploy, execute:

/iw-home/opendeploy/OpenDeployNG/bin/iwodstart <OD_cfg_file>

To invoke DataDeploy, execute:

/iw-home/opendeploy/bin/iwdd.ipl cfg=<DD_cfg_file>
deployment=<deployment_name_from_cfg>

Once the content has successfully deployed, the workflow is complete.

Email Notification

After each user task in the workflow, email notification is sent to the next user informing them of a task requiring their attention. This is done to prevent tasks from sitting in a user's to do list without their knowledge. For external contributors, email notification is the only way of communicating a task.

TeamSite ships with an email script called iwsend_mail.ipl. This script will check for the presence of an email-mapping file, which maps recipient login ids to email addresses. For example: John Doe's login id is johnd. However, the email-mapping file indicates that he should receive any messages not at johnd@ed.gov, but at john_doe@ed.gov.

Iwsend_mail.ipl natively grabs the workflow id and the task id from the TeamSite environment and passes them to itself, however, there is no limit to the number of variables that can be passed into the script. One thing to note is that regardless of the number of variables in the incoming array, workflow id and task id will ALWAYS be the last two variables in the array. For FSA's Students Portal, we pass in the current TeamSite user as the sender, the recipient, the subject, and the message body in addition to the natively passed workflow and task ids. What this means is that when we use these variables inside the iwsend_mail.ipl script, sender is ARGV[0], recipient is ARGV[1], and so on with workflow id and task id being the last two variables. As a result of passing in variables, we are able to customize the body of the message that was created. If different email messages are required based on the recipient, simply copy the entire iwsend_mail.ipl, save it as another name, then make any changes to the new file. When calling the script in the external workflow task, be sure to use the new file name.

Workflow History

Another business requirement for the Students Portal is that a record of each workflow be saved. This record contains the names of each reviewer/approver, any comments added to the task, time and date stamp of each modification, etc. TeamSite creates this XML file without any modification to out-of-the-box functionality and provides accessibility to it via the command line tool iwgetwfobj; however, the file is deleted as soon as the workflow has ended. The Workflow History external task runs just prior to the End task and executes workflow_history.ipl to capture the file using the command line call then writes the XML file to a directory. The workflow file presently saved in the /iw-home/tmp directory with the following naming convention:

wfhistory_contentfilename_year_month_day.log

The contentfilename referenced in the filename is the filename of the content. Once workflow_history.ipl loops through all the tasks associated with the workflow and creates the file, it calls back to the workflow engine.

9.3 Authorized Users

Internal Contributors

Internal Contributors have the role of Editor within TeamSite. An internal contributor can have a dual Editor/Approver role or can just be an Editor. These users have the capability to create or modify content, and they also have the ability to approve content. It is important to note that a creator will never be allowed to approve his or her own content.

Internal Contributor	TeamSite ID	Email address
Tony Magro	TBA	Tony.Magro@ed.gov
Carolyn Washington	TBA	Carolyn.Washington@ed.gov
Wanda Simms	TBA	Wanda.Simms@ed.gov
Jackie Anderson	TBA	Jackie.Anderson@ed.gov
Emanuel Bundy	TBA	Emanuel.Bundy@ed.gov

External Contributors

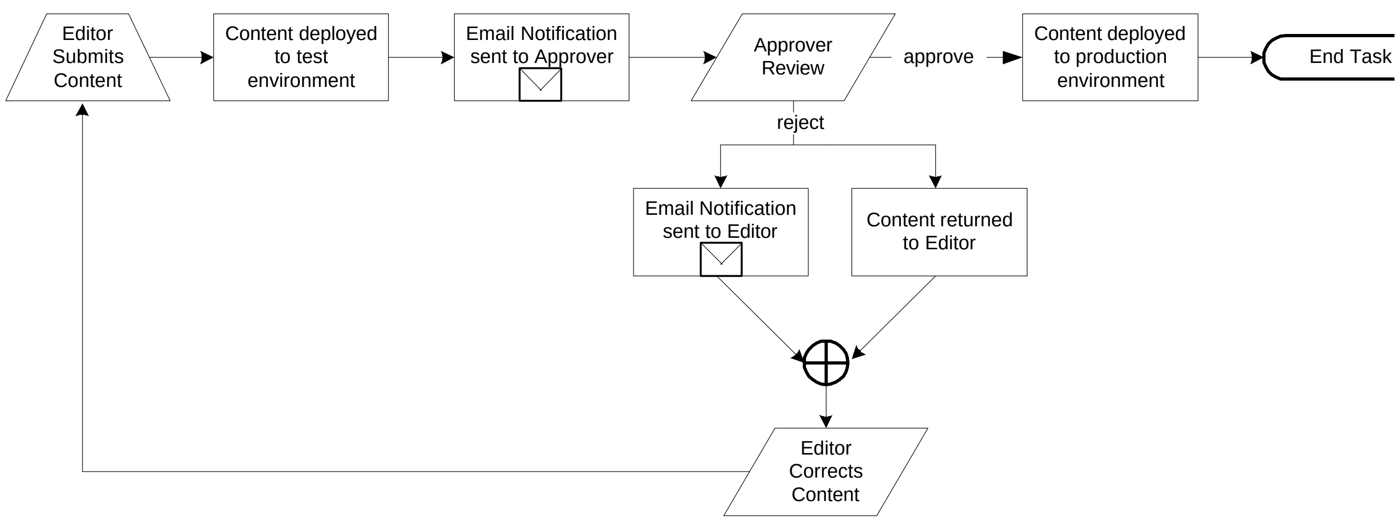
External Contributors do not access TeamSite. Rather, all communications with Internal Contributors (content creation or modification assignment and approval) is conducted via email.

External Contributor	TeamSite ID	Email address
Johan Bos-Beijer	N/A	Johan.Bosbeijer@ed.gov
Anna Allen	N/A	Anna.Allen@ed.gov

9.4 Workflow Diagram

The following symbols denote activities that occur outside of TeamSite.

Internal Contribution



External Contribution